Department of
Local Government Finance

Online Budget Form Program

Indiana County Auditors' Association
Annual Spring Conference

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Data Project Coordinator
Department of Local Government Finance
May 26, 2010

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1816

Agenda

- Project Overview
- Pilot Program Details for Pay 2011
  - Detailed run through of the current program
- Next steps
  - Pilot County Timeline
  - Upcoming development before 2012 budget year
  - Integrating SBOA requirements
- Questions and Answers

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Project Overview

- What is the Online Budget Form Program?
  - Web-based, on-demand filing of DLGF-required budget forms
  - Allows for online data entry and retention
  - Will enable units to print and reprint budget forms for current and previous years
  - Storage of units’ budget data for easy use by counties, units and policy makers

Project Overview

- What’s in it for me?
  - Fewer paper forms means less clutter, no need to gather forms from all over the county
  - Online data entry means fewer opportunities for incorrect values to be entered
  - File budget form data whenever and wherever is most convenient
  - Save work in progress and come back to finish later
  - Increased data availability, more data made available to constituents means greater transparency in government

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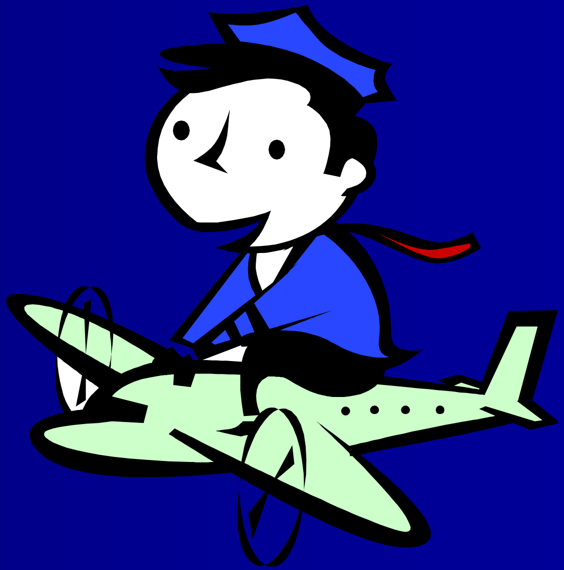
Pilot Program Details

- Covers 7 counties and 155 units
  - 7 county units: Adams, Bartholomew, Daviess, Marshall, Parke, Rush, Vanderburgh
  - 77 townships
  - 35 corporations
  - 16 libraries
  - 12 special districts
  - 3 conservancy districts
  - 5 redevelopment commissions



Pilot Program Details

- What forms will be available?
  - Form 1 – Appropriations
    - Unit will file 1 form for each fund and department
  - Form 2 – Estimate of Revenues
    - Unit will file 1 form for each fund
  - Form 4B – 16-line Statement
    - Unit will file 1 form for each fund

Pilot Program Details

- What role will pilot counties and local units play?
  - File 2011 budget paperwork in the normal way
  - Also will enter 2011 budget information for Forms 1, 2, and 4B into the Online Budget Program and will report any problems or suggestions for improvement of the program

Pilot Program Details

- How will pilot counties and local units use this system?
  - One user account will be established for each unit of government.
  - User account will be keyed to the unit, not to a particular elected official, thus eliminating the need for constant management of user accounts.
  - Unit representative can access the system from anywhere (home office, public library, etc.)

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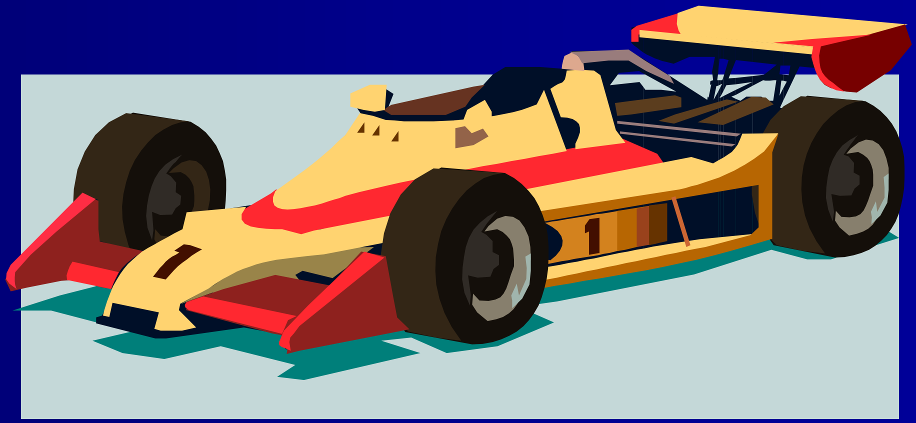
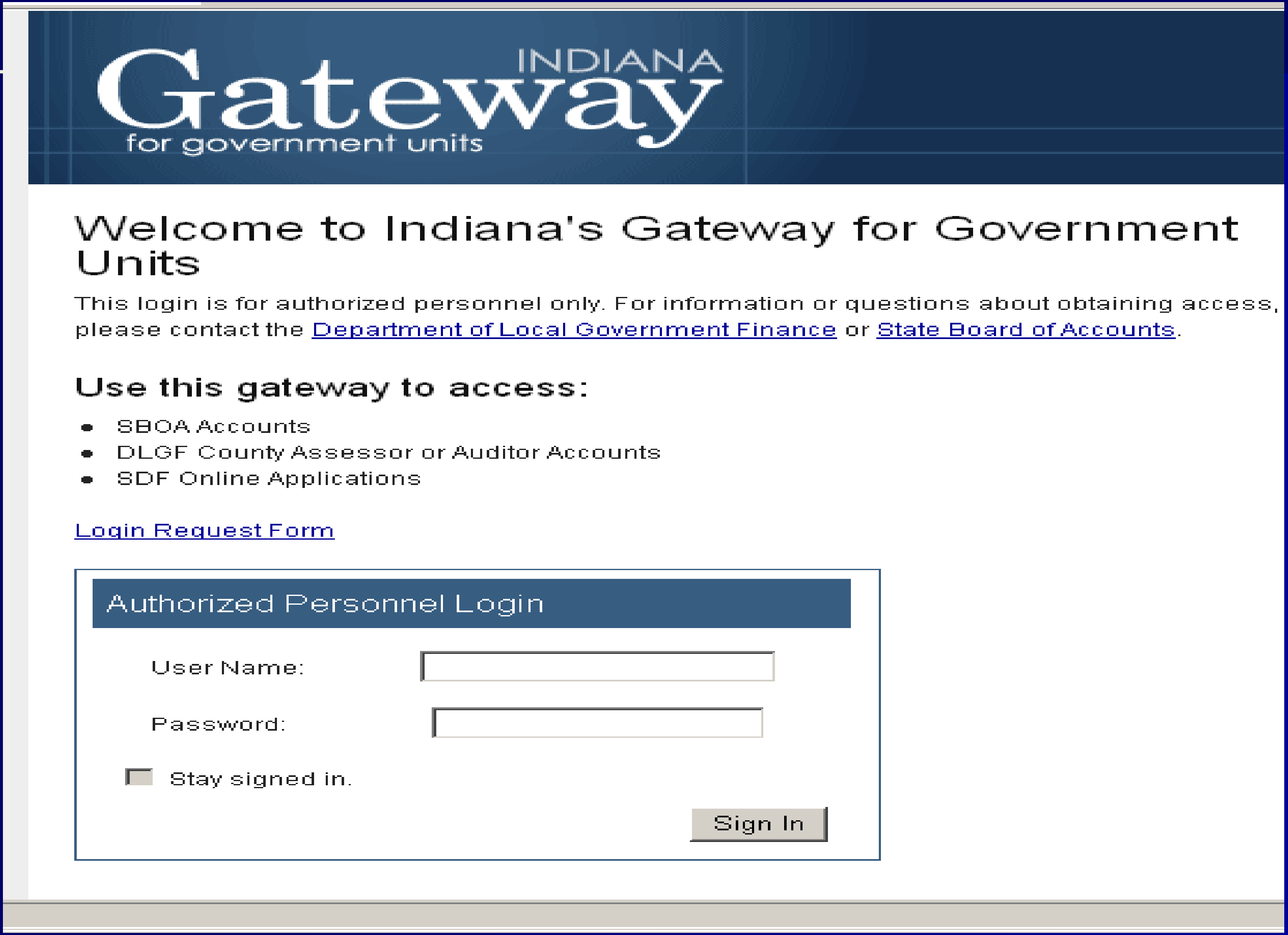
Pilot Program Details

And now for a look under the hood…



The Login Screen



Welcome to Indiana's Gateway for Government Units

This login is for authorized personnel only. For information or questions about obtaining access, please contact the Department of Local Government Finance or State Board of Accounts.

Use this gateway to access:

- SBOA Accounts
- DLGF County Assessor or Auditor Accounts
- SDF Online Applications

Login Request Form

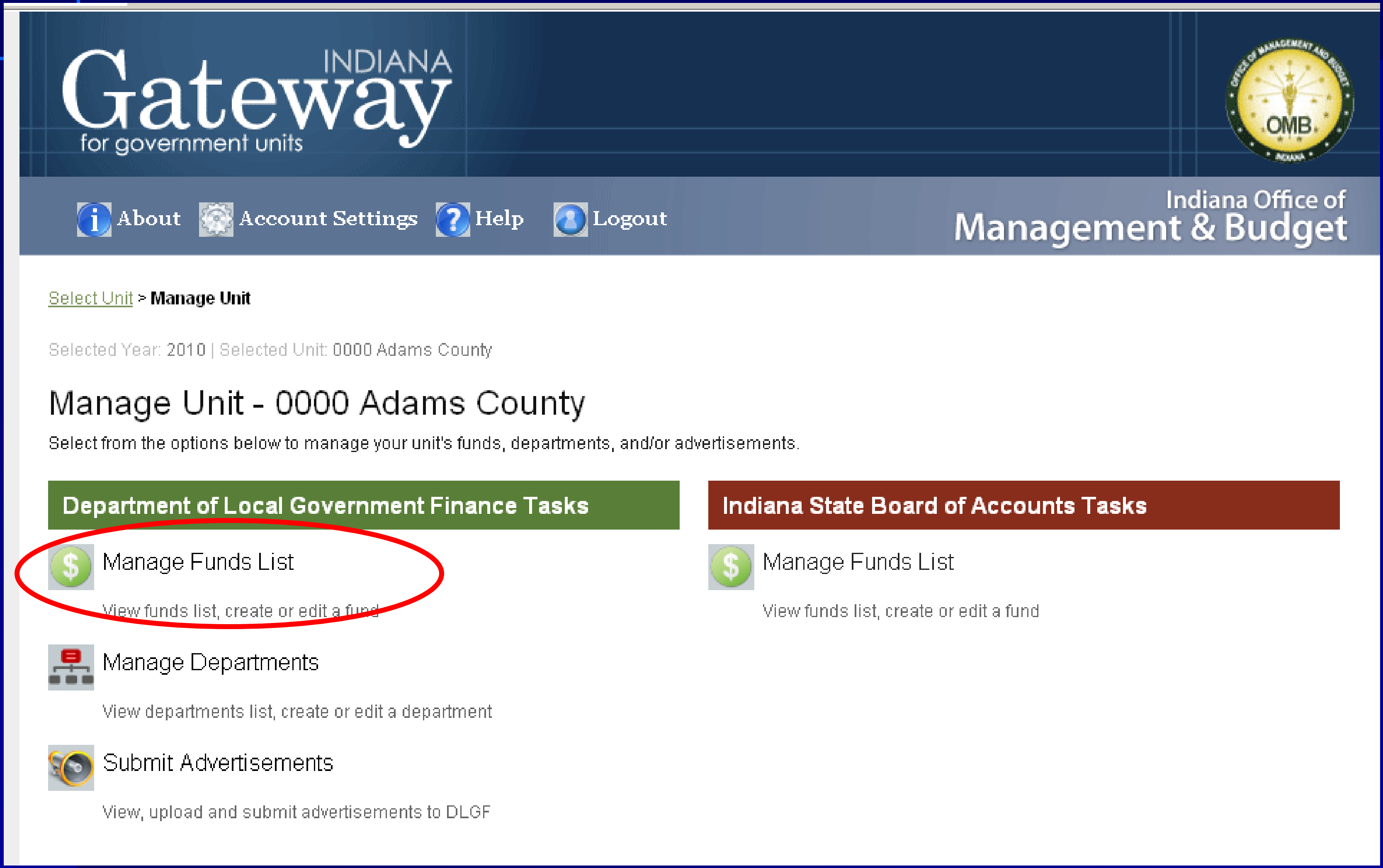
Authorized Personnel Login

User Name:

Password:

☐ Stay signed in.

The Main Screen


INDIANA
Gateway
for government units
OMB
About
Account Settings
Help
Logout
Indiana Office of
Management & Budget

Select Unit > **Manage Unit**

Selected Year: 2010 | Selected Unit: 0000 Adams County

Manage Unit - 0000 Adams County

Select from the options below to manage your unit's funds, departments, and/or advertisements.

Department of Local Government Finance Tasks

Manage Funds List

View funds list, create or edit a fund

Manage Departments

View departments list, create or edit a department

Submit Advertisements

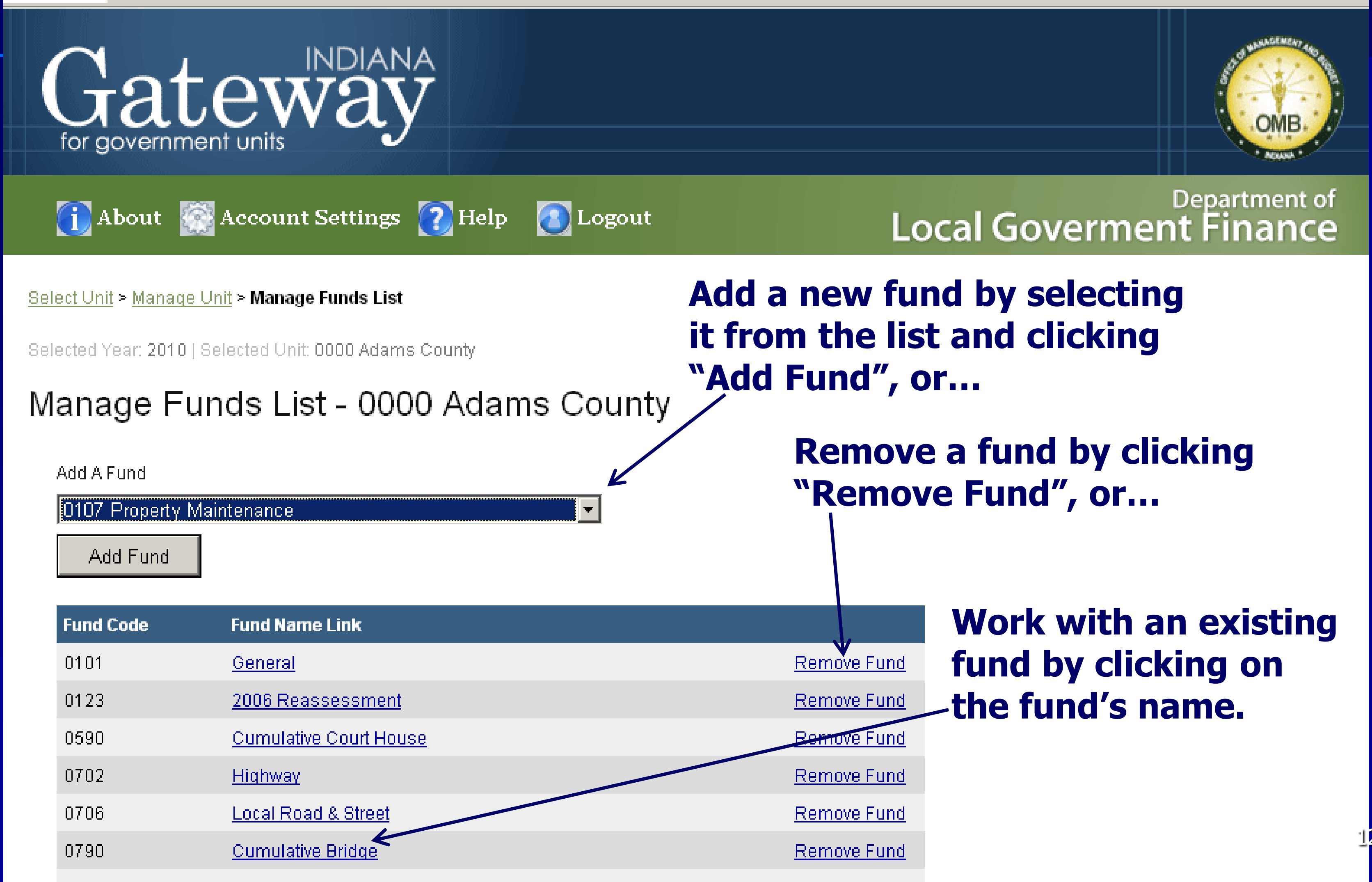
View, upload and submit advertisements to DLGF

Indiana State Board of Accounts Tasks

Manage Funds List

View funds list, create or edit a fund

Working with Funds


INDIANA
Gateway
for government units
OMB
About
Account Settings
Help
Logout
Department of
Local Goverment Finance
Add Fund

Select Unit > Manage Unit > **Manage Funds List**

Selected Year: 2010 | Selected Unit: 0000 Adams County

Manage Funds List - 0000 Adams County

Add A Fund

0107 Property Maintenance

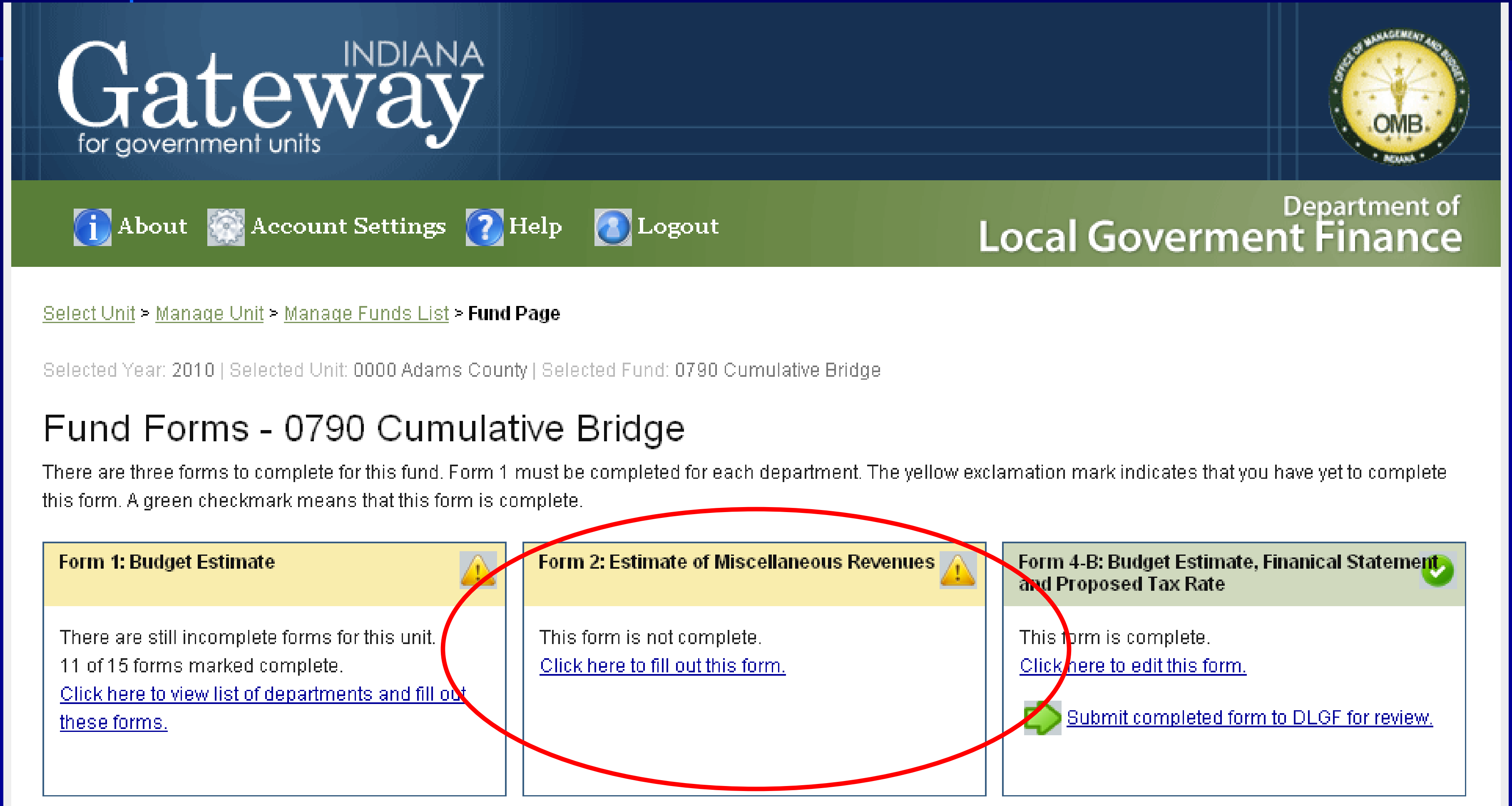
Fund Code	Fund Name Link	
0101	General	Remove Fund
0123	2006 Reassessment	Remove Fund
0590	Cumulative Court House	Remove Fund
0702	Highway	Remove Fund
0706	Local Road & Street	Remove Fund
0790	Cumulative Bridge	Remove Fund
0801	Health	Remove Fund

Add a new fund by selecting it from the list and clicking "Add Fund", or…

Remove a fund by clicking "Remove Fund", or…

Work with an existing fund by clicking on the fund's name.

Working with Forms


INDIANA
Gateway
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Select Unit > Manage Unit > Manage Funds List > **Fund Page**

Selected Year: 2010 | Selected Unit: 0000 Adams County | Selected Fund: 0790 Cumulative Bridge

Fund Forms - 0790 Cumulative Bridge

There are three forms to complete for this fund. Form 1 must be completed for each department. The yellow exclamation mark indicates that you have yet to complete this form. A green checkmark means that this form is complete.

Form 1: Budget Estimate ⚠

There are still incomplete forms for this unit.
11 of 15 forms marked complete.
Click here to view list of departments and fill out these forms.

Form 2: Estimate of Miscellaneous Revenues ⚠

This form is not complete.
Click here to fill out this form.

Form 4-B: Budget Estimate, Finanical Statement and Proposed Tax Rate ✓

This form is complete.
Click here to edit this form.

Submit completed form to DLGF for review.

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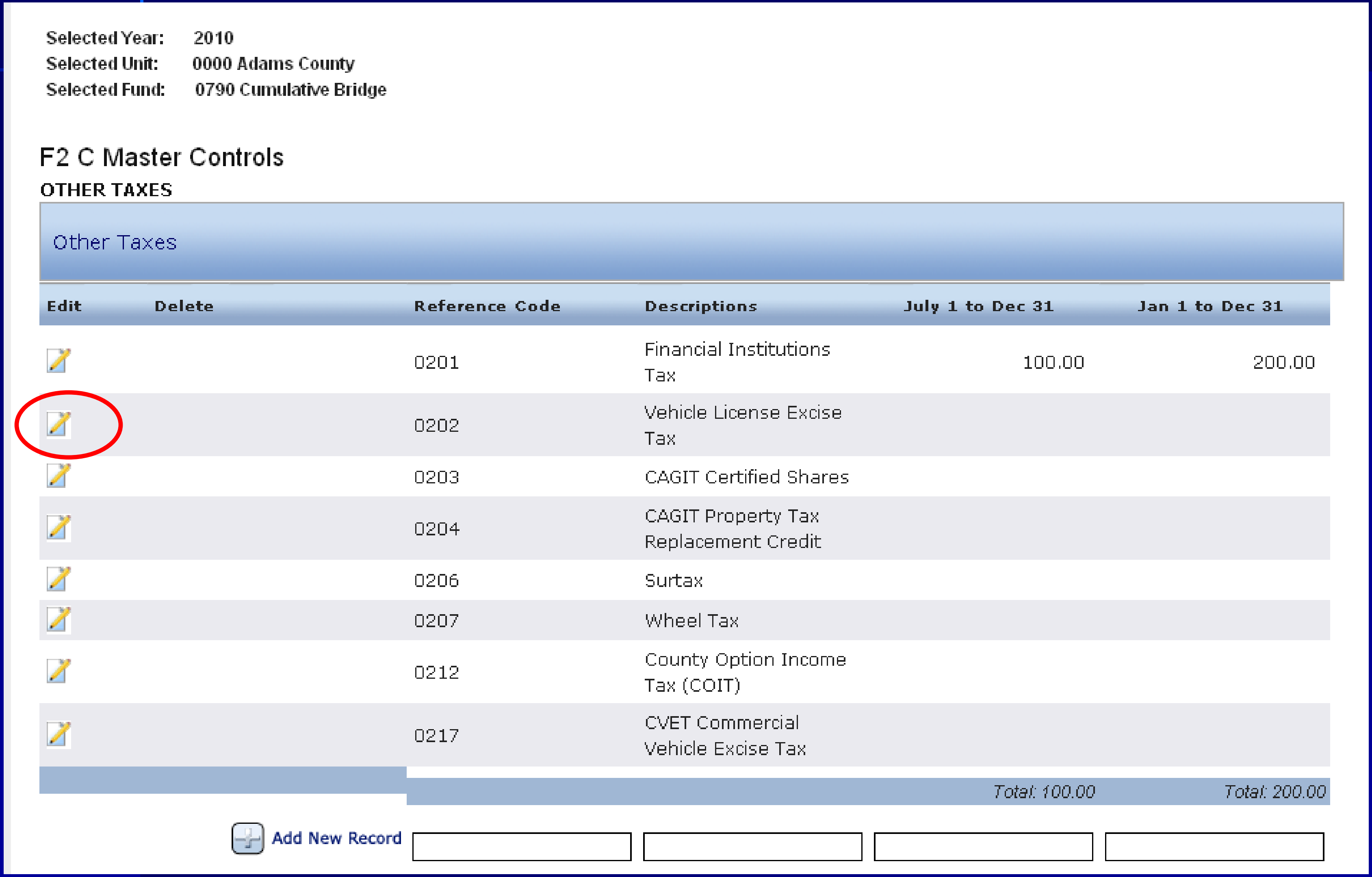
Example Form – Form 2



Selected Year: 2010
Selected Unit: 0000 Adams County
Selected Fund: 0790 Cumulative Bridge

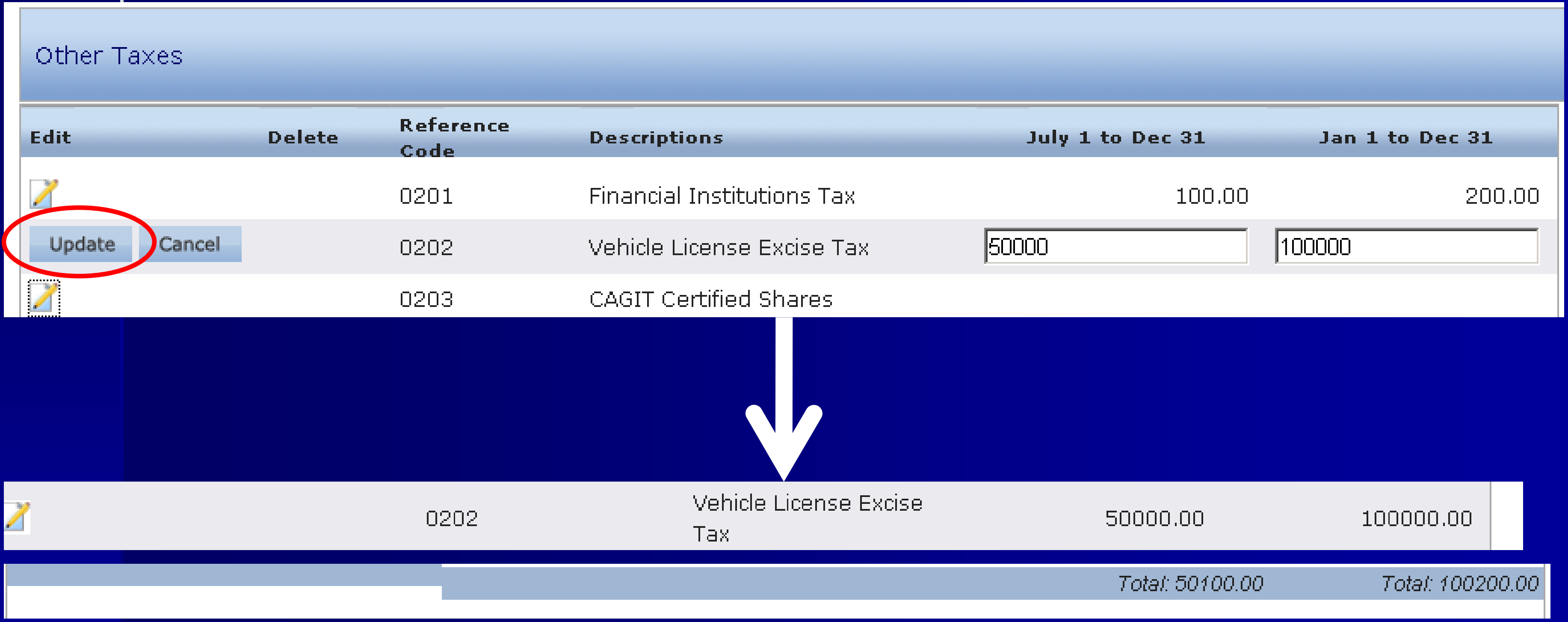
F2 C Master Controls

OTHER TAXES

Other Taxes

Edit	Delete	Reference Code	Descriptions	July 1 to Dec 31	Jan 1 to Dec 31
✎		0201	Financial Institutions Tax	100.00	200.00
✎		0202	Vehicle License Excise Tax		
✎		0203	CAGIT Certified Shares		
✎		0204	CAGIT Property Tax Replacement Credit		
✎		0206	Surtax		
✎		0207	Wheel Tax		
✎		0212	County Option Income Tax (COIT)		
✎		0217	CVET Commercial Vehicle Excise Tax		
				Total: 100.00	*Total: 200.00*

Form 2 – Entering Revenue Amounts for Existing Types

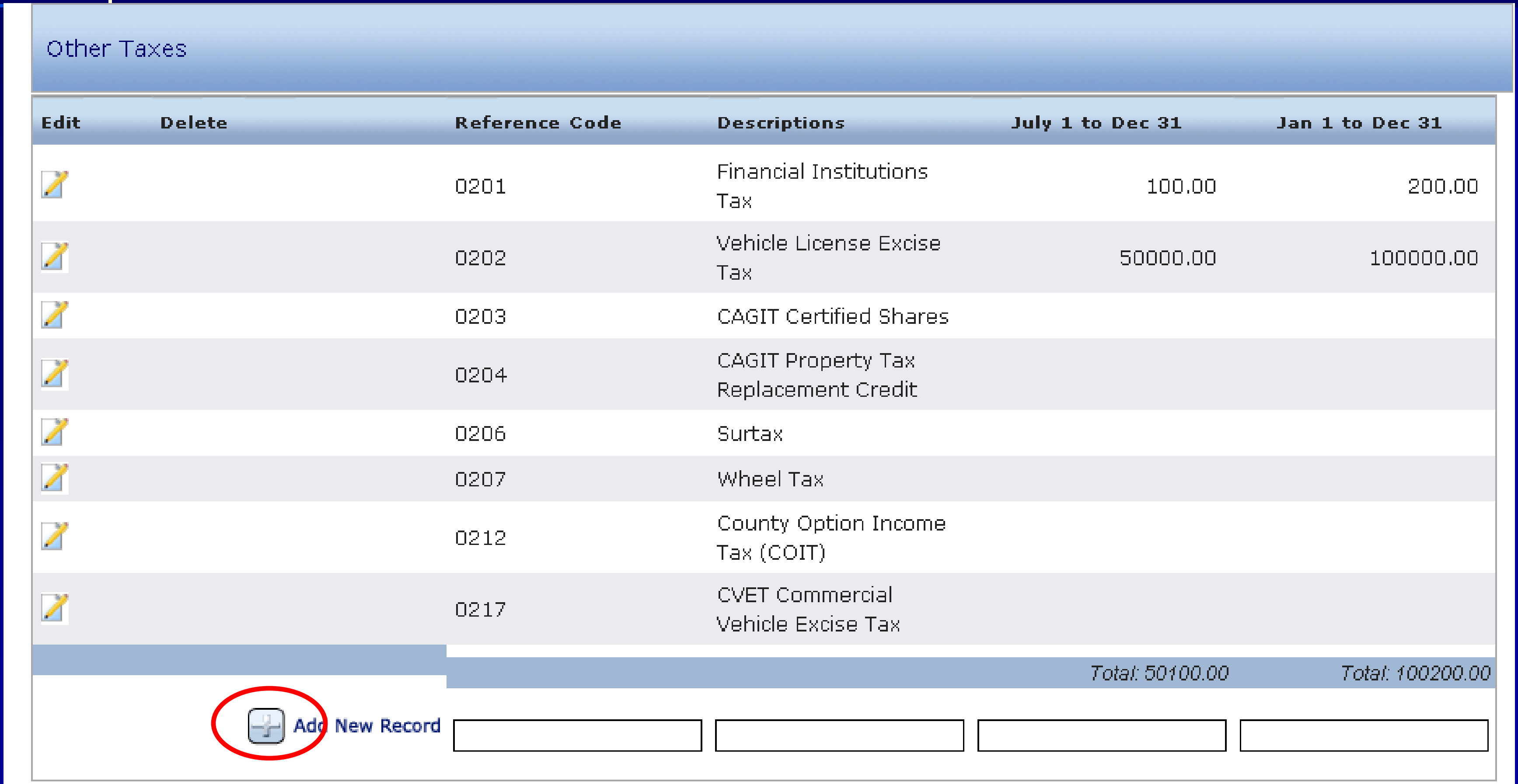


Other Taxes

Edit	Delete	Reference Code	Descriptions	July 1 to Dec 31	Jan 1 to Dec 31
		0201	Financial Institutions Tax	100.00	200.00
Update Cancel		0202	Vehicle License Excise Tax	50000	100000
		0203	CAGIT Certified Shares		

		0202	Vehicle License Excise Tax	50000.00	100000.00
				Total: 50100.00	*Total: 100200.00*

Form 2 – Adding a New Revenue Type



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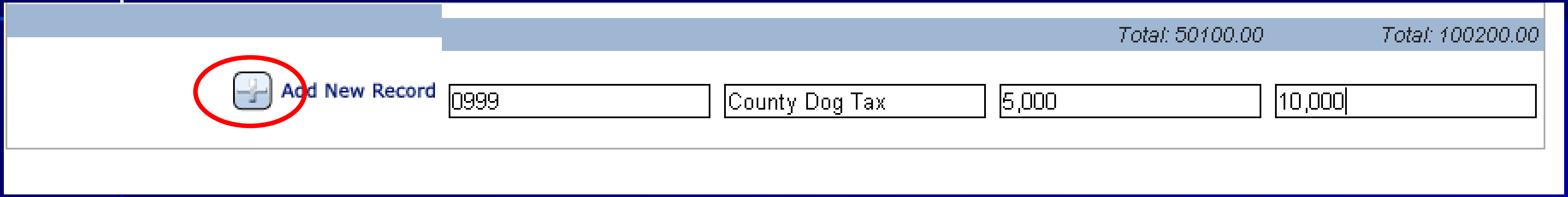
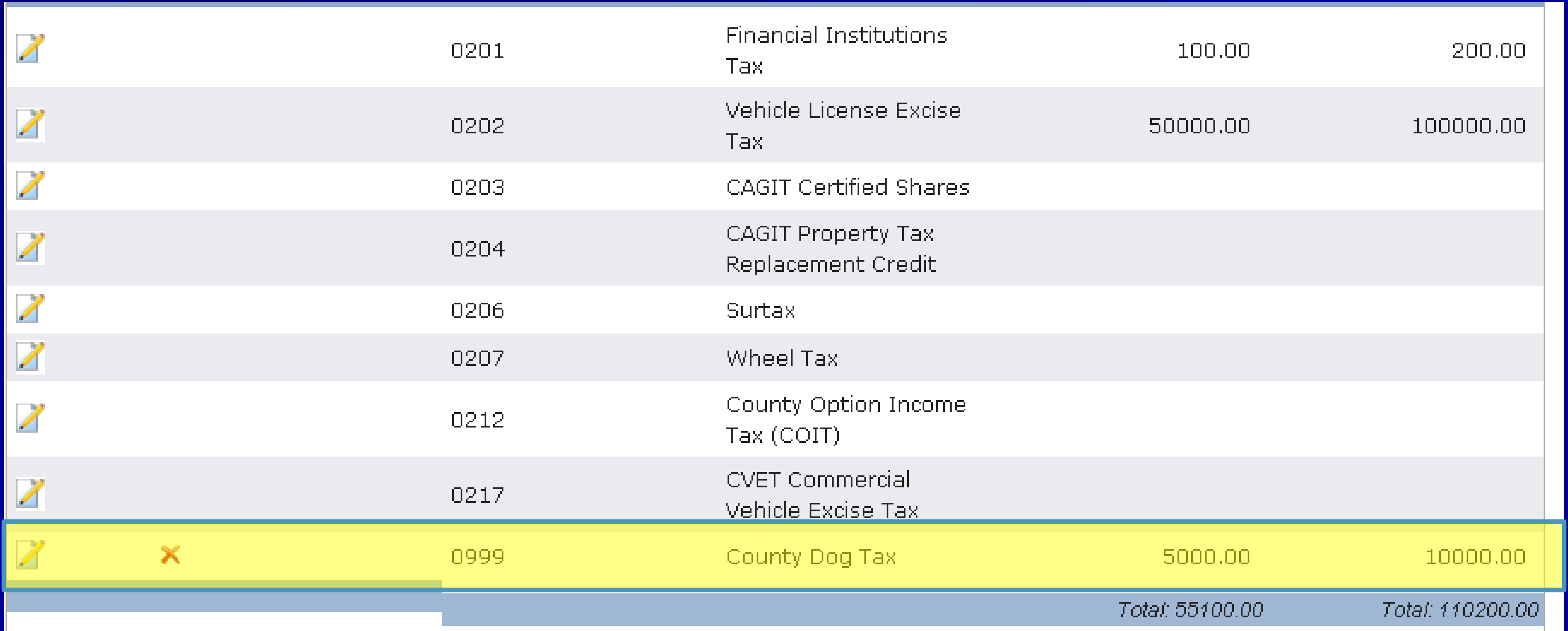
Form 2 – Adding a New Revenue Type



			Total: 50100.00	Total: 100200.00
Add New Record	0999	County Dog Tax	5,000	10,000



	0201	Financial Institutions Tax	100.00	200.00
	0202	Vehicle License Excise Tax	50000.00	100000.00
	0203	CAGIT Certified Shares		
	0204	CAGIT Property Tax Replacement Credit		
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	0207	Wheel Tax		
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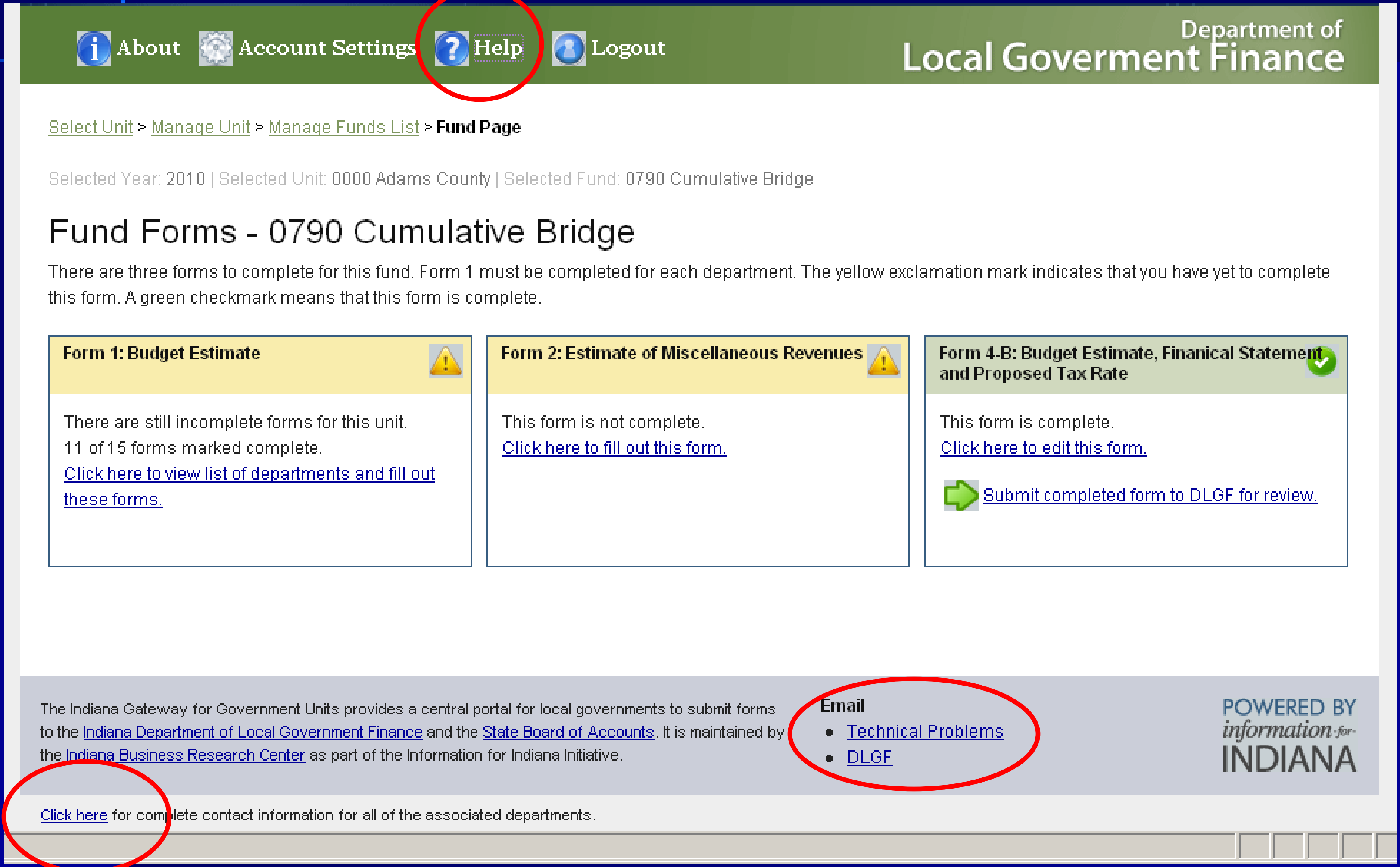
	0217	CVET Commercial Vehicle Excise Tax		
✕	0999	County Dog Tax	5000.00	10000.00
			Total: 55100.00	Total: 110200.00

Technical Support



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Fund Forms - 0790 Cumulative Bridge

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➡ Submit completed form to DLGF for review.

The Indiana Gateway for Government Units provides a central portal for local governments to submit forms to the Indiana Department of Local Government Finance and the State Board of Accounts. It is maintained by the Indiana Business Research Center as part of the Information for Indiana Initiative.

Email
- Technical Problems
- DLGF

Click here for complete contact information for all of the associated departments.

Next Steps – Pilot Counties

- What’s next?
  - Pilot County Auditors will have opportunity to “test drive” the system and provide feedback to DLGF.
  - DLGF will work with Pilot County Auditors to schedule training sessions locally for all units.
  - Training will focus on showing all units how to login, complete the form data entry, and submit finalized data to DLGF.
  - Forms 1, 2, and 4B will be ready for beta testing during the 2011 budget year preparation cycle.

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Next Steps – General Release

- Post-Pilot Program
  - Additional budget forms will be developed and integrated into the online program.
  - Feedback from the pilot program will be factored into continuing development in preparation for general release
  - DLGF will work with all counties to identify local administrators to support units (user accounts, etc.)
  - Ongoing training will be provided (manuals, Web sites, seminars, conference calls) for all participants.
  - The goal is to have a production version, fully tested, for the 2012 budget year.

Next Steps – SBOA

- Integration with State Board of Accounts
  - Concurrent with Online Budget Form development, work is progressing for online filing of annual report data.
  - Same user accounts will be used for both, same central Web site.
  - This will allow for integration of budget and expenditure data in a single data source.
  - Projected go-live for online annual reporting is January 2011.

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Questions and Answers

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Contact The Department

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    - E-mail: jvolz@dlgf.in.gov
- Web site: www.in.gov/dlgf
    - “Contact Us”: www.in.gov/dlgf/2338.htm.